



## UTILITY TAX ANNUAL REBATE PROGRAM CRITERIA

City of Liberty Lake senior and low-income or disabled and low-income residents, living within the city limits, may qualify for a rebate of the utility taxes they were charged in **2014**.

### WHO IS ELIGIBLE?

You are eligible if you can answer **yes to all** of the following statements:

You lived within city limits of the City of Liberty Lake in 2014.....☐ YES ☐ NO

You paid household utilities, which are in your name in 2014.....☐ YES ☐ NO

You were at least 62 years old or disabled in 2014.....☐ YES ☐ NO

The annual gross income of your household in 2014 did not exceed the following: ☐ YES ☐ NO

Household Size	Maximum Combined Household Income
One Person	\$ 35,500
Two Person	\$ 40,600
Three Person	\$ 45,650
Four Person	\$ 50,700
Five Person	\$ 54,800
Six Person	\$ 58,850
Seven Person	\$ 62,900
Eight Person	\$ 66,950
Nine or more	\$ 70,980

### WHO QUALIFIES?

A household residing within the legal boundaries of the City of Liberty Lake; and head of household who is low-income and age 62 or older at the time of application or totally and permanently disabled and low-income, residing in a separately metered dwelling and who is paying directly for such separately billed service either as owner, purchaser or renter and whose individual disposable income is at or below 80% of the median income for the Spokane County area as defined by HUD (Department of Housing and Urban Development).

### WHAT IS "MAXIMUM COMBINED HOUSEHOLD INCOME"?

This is the income received in the 2014 tax year by EVERY member of your household (related or not) who was at least 18 years old.

This includes, but is not limited to: **wages, salaries, bonuses, tips, gross amounts of pensions and annuities, retirement benefits, Social Security benefits (SS), life insurance benefits, interest, capital gains, gifts, inheritances, third party income, and other assets.**

## **WHAT DOCUMENTS ARE REQUIRED TO PROVE INCOME AND PROOF OF RESIDENCY?**

For all members of your household with an income we require:

IRS Form 1040 or W-2 Forms-If you do not file a tax return, you must provide copies of your Social Security statement along with all other forms of income such as pension, interest income, Supplemental Security Income (SSI) or Social Security Disability Insurance (SSDI), etc.

Utility bills showing street address of residence.

## **WHAT OTHER DOCUMENTATION MUST BE PROVIDED?**

- Fully completed Utility Tax Annual Rebate Application and Worksheet Forms
- Copies of 2014 monthly bills showing the utility tax charged by the following utilities only:
  - o Gas and/or Electric
  - o Telephone
  - o Solid Waste/Recycling
  - o Cell Phone
  - o Cable

## **WHEN ARE APPLICATIONS ACCEPTED?**

Applications will be accepted until **June 30, 2015**. Applications received after this deadline will not be accepted.

**Incomplete submittals will be returned without processing and must be resubmitted to The City of Liberty Lake before the June 30, 2015 deadline.**

## **WHAT PERCENTAGE OF THE REBATE WILL BE RECEIVED?**

After the application criteria have been met, an applicant will receive 100% of the utility taxes charged in 2014.

## **WHEN SHOULD I EXPECT TO RECEIVE MY UTILITY TAX REBATE CHECK?**

Rebate applications are processed in the order in which they are received. To expedite your refund, please follow the directions outlined and submit an orderly packet. Incomplete applications will result in a delayed rebate. The City of Liberty Lake City Council meets every 1<sup>st</sup> and 3<sup>rd</sup> Tuesday of each month in which the applications will be submitted for approval. Upon City Council's approval, checks are mailed every 1<sup>st</sup> and 3<sup>rd</sup> Wednesday of the month.

## **QUESTIONS?**

Please contact the City of Liberty Lake City Treasurer at 755-6720. Our regular business hours are Monday – Friday 8:00 a.m. – 5:00 p.m. However, if we miss your call, please leave a message with your name and phone number and your call will be returned promptly.

## **COMMENTS?**

Please let us know how we can make this program easier to understand and how we might improve the application process. Please call 755-6720 with your comments and suggestions.

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